



METROPOLITAN
TRANSPORTATION
COMMISSION

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Agenda Item No. 2c

Memorandum

TO: Operations Committee

DATE: February 2, 2011

FR: Deputy Executive Director, Operations

W.I. 105-1221, 310-2653,
310-2700, 310-2741

RE: ClipperSM Program Report and Contract Actions

- i. Recommended Vendors for On-Call In-Person Customer Education/Outreach Services for FY 2010-11 – 2011-12
- ii. Contract – In-Person Customer Education/Outreach Services: Caribou Public Relations (\$250,000)
- iii. Contract – In-Person Customer Education/Outreach Services: Promoguys Marketing Group (\$250,000)
- iv. Funding Agreement – ClipperSM Parking Payment Pilot Program: San Francisco Municipal Transportation Agency (\$577,000)

Program Status Report

ClipperSM average weekday transaction volume has continued to increase. For the week ending January 21, average weekday transaction volume was 355,750. Recent and upcoming major initiatives include:

- Caltrain ended sales of its paper 8-ride tickets on February 1 and will end sales of paper monthly passes in March.
- San Francisco Municipal Transportation Agency (SFMTA) will end sales of its paper M-Pass (unlimited rides on Muni for a given month) in April.
- BART is now field testing ClipperSM-integrated ticket vending machines. The integrated vending machines allow customers to add ClipperSM e-cash, which is valid on all participating transit systems. By end of March, BART staff will have activated the ClipperSM functionality on vending machines at all stations.
- Golden Gate Ferry begins testing smart card-only ClipperSM Ticket Machines this month.

Contract Actions

Staff recommends that the Operations Committee authorize the Executive Director or his designee to negotiate and enter into the following contract actions.

i. Recommended Vendors for On-Call In-Person Customer Education/Outreach Services for FY 2010-11 – 2011-12

Since July 2010, MTC and transit operators have deployed customer education outreach teams to key transit locations to raise awareness of ClipperSM, distribute free ClipperSM cards, and answer ClipperSM related questions. The deployment of ClipperSM outreach teams is one element of the successful ClipperSM customer education program. To date, MTC and the transit operators have delivered outreach services via subcontractors through Swirl (MTC marketing, web and communications consultant) and Booz Allen Hamilton (ClipperSM Technical Advisor.)

To support the continuation of ClipperSM outreach services, MTC issued a Request for Qualifications (RFQ) on January 18, 2011 to qualify outreach services firms that could work under direct contract to MTC. A panel consisting of staff from MTC and SFMTA evaluated the qualifications based on the following criteria: Consultant expertise and experience, approach, and cost. Following review of the Statements of Qualifications, the panel recommends approving consultants for the bench as shown in Attachment A to this memorandum.

Subject to the availability of funding, MTC will enter into individual contracts for services with firms based on the best match between programmatic needs and each firm's strengths. Contracts in excess of the Executive Director's delegated signature authority will return to this Committee for review and approval.

ii. Contract – In-Person Customer Education/Outreach Services: Caribou Public Relations (\$250,000)

Subject to the Committee's approval of item (i) above, staff recommends a contract not to exceed \$250,000 with Caribou Public Relations. Caribou has provided outreach services to the TransLink[®]/ClipperSM Program for several years while working under subcontract to both Swirl and Booz Allen Hamilton. Under the proposed contract, MTC will execute task orders with Caribou for the provision of services in the following work areas with a particular focus on transit riders in San Francisco: education for SFMTA M-Pass customers; education for senior, youth, and disabled customers; and general ClipperSM education. Staff requests the Committee to permit the contract to be let in one or more increments (i.e. a contract and subsequent amendments), based on the needs of the project.

iii. Contract – In-Person Customer Education/Outreach Services: Promoguys Marketing Group (\$250,000)

Subject to the Committee's approval of item (i) above, staff recommends a contract not to exceed \$250,000 with Promoguys Marketing Group. Promoguys has provided outreach services to the ClipperSM Program over the past seven months while working under subcontract to Swirl. Under the proposed contract, MTC will execute task orders with Promoguys for the provision of services in the following work areas: general ClipperSM education for BART, Caltrain, and VTA riders; education for limited-English proficiency customers; education for senior, youth and disabled customers; and general ClipperSM education. Staff requests the Committee to permit the contract to be let in one or more increments (i.e. a contract and subsequent amendments), based on the needs of the project.

iv. Funding Agreement – ClipperSM Parking Payment Pilot Program: SFMTA (\$577,000)

The USDOT Urban Partnership Program (UPP) has provided funds to MTC to conduct a pilot implementation of ClipperSM at SFMTA parking garages. This pilot will enable parking garage customers to pay parking fees with a ClipperSM card at five garages in San Francisco. In addition, the ClipperSM Contractor, via contract change order, will implement functionality that allows customers to use ClipperSM cash value for non-transit payments. The proposed funding agreement will provide funds to SFMTA for project management, contractor oversight, testing, and training. In addition, this funding agreement provides funding for design, integration and implementation work that will be carried out by SFMTA's existing parking contractor, DataPark, as directed by SFMTA.

Andrew B. Fremier

ABF:JA

Attachment A
On-Call In-Person Customer Education/Outreach Services for FY 2010-11 – 2011-12
List of Recommended Firms

1. Caribou Public Relations, Martinez, CA
2. Promoguys Marketing Group, Red Bank, NJ

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Contract

Work Item No.: 105-1221, 310-2700

Contractor: Caribou Public Relations
Martinez, CA

Project Title: ClipperSM In-Person Customer Education/Outreach
Services

Purpose of Project: Promote awareness of ClipperSM and provide on-site
assistance at key transit locations to ClipperSM customers

Brief Scope of Work: Execute in-person customer education/outreach events at
key transit locations

Project Cost Not to Exceed: \$250,000

Funding Source: CMAQ, STA, STP Exchange, Regional Measure 2 Capital and
Regional Measure 2 Operating

Fiscal Impact: Funds included in FY 2010-11 agency budget

Motion by Committee: That the Executive Director or his designee is authorized to
negotiate and enter into a contract and associated amendments
with Caribou Public Relations to provide Outreach and
Educational services, and the Chief Financial Officer is
authorized to set aside funds up to \$250,000 for such a contract
and amendments.

Operations Committee:

Amy Rein Worth, Chair

Approved: Date: February 9, 2011

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Contract

Work Item No.: 105-1221, 310-2700

Contractor: Promoguys Marketing Group

Project Title: ClipperSM In-Person Customer Education/Outreach Services

Purpose of Project: Promote awareness of ClipperSM and provide on-site assistance at key transit locations to ClipperSM customers

Brief Scope of Work: Execute in-person customer education/outreach events at key transit locations

Project Cost Not to Exceed: \$250,000

Funding Source: CMAQ, STA, STP Exchange, Regional Measure 2 Capital and Regional Measure 2 Operating

Fiscal Impact: Funds included in FY 2010-11 agency budget

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract and associated amendments with Promoguys Marketing Group to provide Outreach and Educational services, and the Chief Financial Officer is authorized to set aside funds up to \$250,000 for such a contract and amendments.

Operations Committee:

Amy Rein Worth, Chair

Approved: Date: February 9, 2011

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Funding Agreement

Work Item No.: 310-2653

Contractor: San Francisco Municipal Transportation Agency (SFMTA)

Project Title: ClipperSM Parking Payment Pilot Program

Purpose of Project: Pilot project to enable ClipperSM card as a payment option at five SFMTA parking garages

Brief Scope of Work: SFMTA to provide project management, oversight and coordination with parking subcontractor. Subcontractor to provide design, integration and implementation services.

Project Cost Not to Exceed: \$577,000

Funding Source: ITS-OTMC (federal UPP funds - 80%)
SAFE (local match - 20%)

Fiscal Impact: Funds included in FY 2010-11 agency budget

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a funding agreement with SFMTA related to implementation of the ClipperSM parking payment pilot program, and the Chief Financial Officer is authorized to set aside funds up to \$577,000 for such a funding agreement.

Operations Committee:

Amy Rein Worth, Chair

Approved: Date: February 9, 2011